

SmartScript

Summary:

SmartScripts are designed to help the Intake Specialist gather data from a caller in an accurate and consistent manner. The client has expressed concern that many fields within OCTS 1.0 were not routinely populated. SmartScripts will help to facilitate this.

Based on answers to initial questions within the Greeting, one of 5 scripted scenarios will be executed. Siebel Vanilla was referenced for all scenarios. However, Scenarios 1 and 2 required customization using VB code in order to save a single field across the Account, Contact and Service Request business components. Scenarios 3, 4 and 5 required customization to achieve the same result. See the Siebel VB Code section for details.

Scripting Scenarios:

1. New Customer/New Case – Borrower Calls: Utilized to create a new case when the caller is the borrower and has not called the Office of the Ombudsman before.
2. New Customer/New Case – Third Party Calls: Utilized to create a new case when the caller is a third party and has not called the Office of the Ombudsman before.
3. Existing Customer/Existing Case – Status or Demographic Update: Utilized when an existing customer calls back to the Office of the Ombudsman to request a status update or make changes to information they provided earlier.
4. Existing Customer/New Case – Borrower Calls: Utilized when a customer exists in the database but is creating a new case. The caller is the borrower.
5. Existing Customer/New Case – Third Party Calls: Utilized when a customer exists in the database but is creating a new case. The caller is a third party.

For the actual questions used in each scenario, please refer to Appendices D1-D5.

VB Code

Siebel VB code was used extensively within all 5 scripts and appears at the script level and/or question level. It was required in order to save data across multiple business components, create data relationships, utilize pick-lists and pick-applets within script questions, populate questions dynamically, populate the dashboard, search the decision issues within the encyclopedia and to dynamically connect scripts together.

In Scenarios 1 and 2, individual script questions were used for each field to be populated. Many of these fields appeared in at least two of the three business components populated through scripting. Because of this there was a need to connect the answers to questions across all business components where the field appeared. VB code that did not exist in Siebel Vanilla was required for this at both the script and question levels.

For Scenario 3, no VB code was required.

For scenarios 4 and 5, pick applets were used to add new data and the connectivity between business components existed through the application. Although some VB code was required for this, much of it existed within Siebel Vanilla and was modified for OCTS 2.0 use.

For the actual VB Code, please refer to Appendix C4.